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ABSTRACT

This handbook outlines the concerns and potential opportunities about which those who desire or accept a new principalship should be aware before considering such a professional move. The book identifies both potential minefields and the positive aspects of the process. Topics include: (1) obtaining maximum information before applying; (2) preparing for the interview; (3) analyzing personal strengths, needs, and leadership style; and (4) maximizing the possibilities of the first year in a new principalship. Also important are developing an understanding of the existing school culture, making change slowly, and getting to know all the players in the new environment. Principals are advised to thoroughly research the history of the school and its heroes, gather information on school and community demographics, and assess school needs before deciding on a course of action for school improvement. (LMI)

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Principals in Transition

Tips for Surviving Succession

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Principals in Transition

Tips for Surviving Succession

Barbara L. Brock
Marilyn L. Grady

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Foreword

Drs. Brock and Grady outline the concerns and potential opportunities about which those who desire or accept a new principalship should be aware *before* considering this professional move. In *Principals in Transition: Tips for Surviving Succession*, they emphasize the potential minefields as well as the positive aspects of the process. Topics include (a) obtaining maximum information before you apply; (b) preparing for the interview; (c) analyzing your personal strengths, needs, desires, and leadership style; and (d) maximizing the possibilities of your first year in a new principalship.

Such matters as understanding the existing culture, making change slowly, and getting to know all the players in the new environment are stressed. The authors also emphasize the need to do a thorough job of researching the history of the school and its heroes as well as the demographics of the school and the community it serves.

Practical hints and suggestions are woven throughout this brief and easily read text. An annotated bibliography is included to assist those who wish to read further as they consider moving into a new principalship.

JERRY J. HERMAN
JANICE L. HERMAN
Series Co-Editors

About the Authors

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Dr. Grady coordinates an annual conference on women in educational administration that attracts national attendance and is in its 8th year. She has served on the executive board of the National Council of Professors of Educational Administration, the Center for the Study of Small/Rural Schools, and PDK Chapter 15. She is a member of AERA, the Horace Mann League, the Schoolmasters Club, MWERA, NCPEA, AASA, and PDK.

She has been an administrator in K-12 schools as well as at the college and university level. She received her B.A. in history from Saint Mary's College, Notre Dame, Indiana, and her Ph.D. in educational administration with a specialty in leadership from Ohio State University.

Introduction

Principals in Transition is a text written for the individual moving to a new principalship or the individual considering such a move. Changing administrative positions is exciting, exhilarating, and possibly disastrous. The prospect of bringing years of experience and fresh ideas to a new setting is motivating, enticing, and possibly frightening. The exuberant, incoming principal plunges into the tasks at hand, anticipating an equally enthusiastic response. When confronted with resistance and antagonism from the staff, he or she is baffled, disappointed, and confused. What went wrong?

The principal, perhaps, believed in the following "fatal fallacies":

- You will be enthusiastically welcomed and accepted by all.
- Everyone will look forward to hearing your new ideas.
- You will begin with a "clean slate," without the baggage of history and old agendas or resentments.
- The first year will be a "get acquainted" period—a time to settle in.
- Your experienced leadership style will be compatible with this school.

After painful experiences, the unwary incumbent acknowledges the impact of a change in school leadership.

Change is fundamental to human existence. At times we embrace it with optimism and enthusiasm, anticipating the opportunities that change may bring. At other times, the mere mention of change fills us with fear and dread. Anxious feelings arise because of the potential loss of security, relationships, or resources. Change elicits a strong psychological response from the people involved.

Leadership succession in a school creates a change that affects the entire school community. When one principal leaves and another enters, the dynamics of a school change and transition begins. An error made frequently by succeeding principals is underestimating the effect that change will have on the school population and the community stakeholders. A second error is underestimating the time needed to adjust to change. A third error may be underestimating the personal costs of being the succeeding principal.

The wise principal will acknowledge anxiety and reluctance to change as normal human responses. The skilled principal will be wary of those who may seize the opportunity of change to fulfill personal agendas. Similarly, the skilled principal will recognize individuals who seek the opportunities for growth that change provides. Transition can be positive and productive if the succeeding principal understands the change process and the new school population and community.

Principals in Transition is written by individuals who have survived succession. The book focuses on the change and transition period: the selection process, the history of the school, community demographics, parental support, the school staff, school norms and organization, and leadership style.

Making an Entrance: Preparation Is Everything

An administrative position opens up in a neighboring school district. Eager for a change, you hastily apply.

The decision to change administrative positions may be a factor of aspiration, inspiration, or frustration. Administrative turnover is frequent and marked by incredible opportunity and tremendous aggravation. Those who consider a new administrative position must carefully consider their motives and the costs and benefits involved in the transition.

A benefit of a change could be meeting personal and professional needs. The new principalship may be a perfect job with great challenge and fine colleagues. However, the new principalship could be a disappointment. You might find yourself in an untenable situation. You may be asked to do things contrary to your beliefs or you may encounter issues you are not prepared to handle. You may regret ever having taken the job.

Regardless of the outcome, considering or making a change in jobs can cause an adrenalin surge. This book is designed for those who are considering or making a change in principalships. It is

based on our interviews with principals who have made administrative transitions, a review of the literature concerning administrative transitions, and our own experiences.

Being prepared for the interview, gathering information, analyzing the situation, and strategizing for transition are important steps once you have identified your career objective. Although preparation for a transition is not new to the experienced administrator, it is a critical step. Individuals preparing for first administrative roles engage in these activities. Individuals seeking second and third administrative roles need to carefully consider these same issues. Overconfidence or assumptions may be misleading.

Gathering Important Information

Your initial concern is gathering information that will allow you to decide whether or not this is an appropriate career move. If you apply for the position, the knowledge that you gain from the information search will increase the likelihood that you will be offered the position.

The amount and type of information available is limited only by the time and effort you can invest in the gathering. For instance, there are written documents that describe the school, district, and community. The principal's job description, faculty handbook, student handbook, curriculum guides, school calendar, supervision and evaluation manual, and the school's and district's annual reports are important written sources. The state department of education or county superintendent may have significant demographic, academic, and financial information concerning the school. Past and present employees can provide outstanding contemporary information. The local newspapers will provide information about critical issues and community norms. Your social and professional contacts will be essential links to key data.

The Predecessors

Why is this position available? You will want to know about previous principals. Were these long-term or short-term administra-

tors? Why did the last principal leave? One principal reminded us, "It's always easier to follow a less-liked principal."

Is the change caused by retirement, illness, demotion, or promotion? How often have principals changed at the school? If turnover has been frequent, what are the reasons for the rapid succession of principals? Consider the risks that you will assume if you take the job.

If leadership changes have been frequent, but for acceptable reasons, consider the impact of the changes on the school. Lack of continuity or closure may create distrustful teachers with a "holding pattern" mentality. Teachers may be reluctant to embrace new ideas because "this principal won't last." Others may see a new principal as an opportunity for stability and long-range planning.

If the predecessor's tenure was lengthy and uneventful, some teachers may be anxious for new ideas and change. Other teachers may mourn the loss of a "beloved" principal, be deeply entrenched in the status quo, or be resentful of the slightest innovation.

Beware of the "Rebecca Myth," as described by Gouldner (1954). Named after du Maurier's novel *Rebecca*, the myth is about the process of idealizing predecessors regardless of their objective qualities. If the predecessor died or retired and was well liked by the faculty, the successor will need to allow time for the school community to adjust to the loss.

Termination or promotion of a predecessor will also affect the succeeding principal. Forced successions may inspire resentment in remaining organizational members, whereas legitimate factors—death, promotion, voluntary retirement—may provide a positive environment for a new manager (Grusky, 1963). If the previous principal was terminated or demoted, the succession of a new principal in itself may be viewed as a positive step in improving the school. Promotion of the predecessor may be viewed as a sign that the organization has judged the previous principal's policies and behaviors as successful. As a result, the successor may feel reluctant to make changes.

The perceptions of the teachers and school community regarding the success or lack of success of the previous principal will be key factors in the acceptance of your leadership.

In an article titled "When Leaders Leave," Wasley (1992) points to problems within the system that should be considered. First,

frequent turnover must be expected. Second, time is an important factor in reform, and leadership transitions often interfere with project timetables. Third, leadership changes, whether expected or not, can disrupt projects drastically.

Educators in leadership positions move frequently. Teachers, principals, and central office staff move often because the career ladder, weak in incentives, requires that they keep moving in order to gain salary increases or greater decision-making authority (Sykes, 1987). In some districts, it is common practice to move principals every 3 years or so "to prevent mold from growing" (Wasley, 1992, p. 65).

The Superintendent

The superintendent's philosophy and leadership style provide the vision and direction for the school district. The principal will be expected to be part of a team working toward a shared vision. The principal's values and leadership style must be compatible with other leaders in the school district. Newspaper accounts and board reports may provide information about the superintendent's vision for the district. Determine how the superintendent communicates with and delegates authority to building principals. Do other district principals report positive and supportive relationships with the superintendent? How and by whom is the evaluation of principals accomplished?

Expectations

The work of a principal includes a variety of roles. The culture of the school and the expectations of the school's reference groups help determine the roles adopted by the principal. One principal pointed out that the move from one school to another was a real shock. He found that the new job included many of the responsibilities of a superintendent, and he was unprepared. Before accepting a position, consider the expectations of parents, teachers, students, and community.

District Expectations

Expectations of superiors are important. Superiors hire you and determine your salary, status, and retention. Obviously, their ex-

pectations matter. Are there specific expectations for the new principal? Is there a specific agenda for the school and the administrator?

Knowing which administrative responsibilities the district expects the building principal to handle is vital. Districts vary in the tasks assigned to principals. Examine expectations regarding attendance at district meetings, personnel responsibilities, committee assignments, financial obligations, and involvement in new construction or remodeling.

Meetings require a significant time commitment. Knowing the number and nature of district-level meetings provides clues to the workload and focus of the district.

Responsibilities for the employment of school personnel vary. Find out whether you will be responsible for recruiting, selecting, and assigning faculty as well as office, cafeteria, custodial, and maintenance staff. Hiring quality staff members is imperative. If you will be responsible for these personnel activities, you must be comfortable with the procedures and your ability to perform them.

Supervision and evaluation are typically part of a principal's responsibilities. Because you will be responsible for the dismissal of incompetent personnel, identify procedures that have been used in the past.

What will be the scope of your financial tasks? Who prepares and monitors the budget? Who is responsible for purchasing and the accompanying financial records? Will you have fiscal responsibility for the athletic, cafeteria, and school activities?

Visit the school. What is the condition of the building? Is there a long-range plan for building maintenance? Will you be responsible for imminent new construction or renovations?

Expectations of Teachers and Staff

Teachers have many and frequently conflicting expectations of a principal. They want the principal to be an instructional leader, keep the school running efficiently, communicate well, be a visible presence in the building, be a good disciplinarian, involve teachers in school decisions, and be supportive. How teachers prioritize their expectations and how they want them delivered varies. Knowing faculty expectations is extremely important. Consider whether

meeting teachers' expectations is possible or desirable. Teachers generally accept the leadership of the principal when they feel that their expectations are being met. If you choose not to act on their expectations, the resulting consequence will be the teachers' rejection of your leadership. Your alternative is to convince the teachers to modify their expectations.

The school's support staff—paraprofessionals; secretaries; and custodial, cafeteria, and maintenance workers—view the strengths and weaknesses of a school from different perspectives. They too have expectations for the principal and the direction the school should take. Because they speak daily with parents, faculty, students, and members of the community, they are essential communication links.

Expectations of Parents

Parents have expectations for principals based on their perceptions of the principal's role, their past experiences with principals, and the strengths and weaknesses of their school. Their expectations may be as heterogeneous as the community itself. Listen to their comments. What do parents expect from the principal? Take note of any issues you hear discussed or read about in the newspaper. Are the parents lobbying for specific changes in the school?

Compatibility of Expectations

The expectations of the school district, teachers, and parents may not be compatible. The new administrator will need to determine which expectations to meet and suffer the consequences of not meeting others. If the expectations of the groups are divergent, the principal will be entangled in inevitable conflict. The risks involved in accepting a position that will be fraught with conflict and unresolved expectations should be carefully considered.

The Community

Schools exist within and draw financial and social support from the community. The community exercises power over the school through the local school board that establishes policies and approves expenditures. Because of its strong influence on the schools, the

community is an important consideration in accepting an administrative position.

You will need to gather information about the people who make up the community. You will need to be particularly attentive to what makes this community unique or different from your current community. If you know the percentage of the population with school-aged children, you will have an indicator of how people feel about financing the schools. The economic basis of the community is an important factor. Determine the ratio of professional to blue-collar workers, the unemployment rate, and the percentage of people on welfare. Is the population stable? How has the population grown or declined over the past 10 years?

Determine the attitude of the citizens toward the schools. Are residents satisfied and proud of their schools? What are the important issues within this community? Who are the leaders?

What is the background of community members? Has the population been stable for many years, or is this a community in transition? How will you fit in with the culture and norms of this community?

The School Staff

You will spend most of your time with the school staff, and this group is most essential to quality in the school. What levels of expertise and maturity are represented within this group? What is the rate and frequency of staff turnover? Frequent turnover may be indicative of internal problems.

Schools have a variety of administrative configurations that can include a principal, assistant principals, coordinators, activity and athletic directors, and a business manager. Because your role as principal will be affected by the administrative team, you need to understand the roles and responsibilities of the team members. You also will want to know about their level of performance and reputation in the school community.

Other issues to consider are the relationships of the assistants with the previous principal and their career aspirations. Both will be factors in their acceptance of you. Are any of the assistants seeking the principal's position? If so, what happens if you are awarded the position and the assistant remains in the school?

Find out the size, experience, and educational levels of the faculty. Look for evidence of ongoing professional growth. Listen to what parents and other residents say about the teachers. What do students say about their teachers?

A change of principals can be traumatic for a faculty. Examine the relationship of the faculty with the previous principal. Do the faculty welcome or dread change in administrators?

If the school has a counselor, psychologist, social worker, and nurse, identify the role and effectiveness of each person. How many paraprofessionals are employed and what are their roles?

A proficient office, custodial, maintenance, and cafeteria staff is essential in an effective school. Who staffs the school office? What was their relationship with the previous principal? Are they efficient, trustworthy, and loyal? Do teachers, students, and parents view them as effective? A secretary can be either your best ally or your worst enemy.

Critical areas that can create major problems for incoming principals are custodial and cafeteria concerns. Who is responsible for cleaning and maintaining the physical plant? How is the cafeteria staffed?

The Clientele

The manner in which a school's programs and procedures are designed and delivered depends on the needs of a particular group of students. The preparation, experience, and expertise of the school administrator must match the needs of the school setting. Consider the following issues to determine whether or not you are prepared to meet the needs of the students.

Obtain a breakdown of enrollment by grade level. Find out whether or not the enrollment has increased or decreased during the past 10 years.

Secure a copy of the current standardized test scores. Check the local papers for special recognition, awards, honors, and scholarships received by the students.

Identify the percentage of special education students. How extensive are the special education services provided by the school?

Do you have the background and expertise to provide leadership for these programs?

What percentage of students are gifted? If the school provides gifted programs, are you prepared to provide program leadership?

Do students attend this school because of its reputation in a specific area, such as computers, science, or the fine arts? If the school is a magnet school, are you knowledgeable in the curriculum areas?

Schools usually have a reputation for their student behavior. What is the reputation of the students? Does the school use a particular model of classroom management or discipline? Will your style of discipline meet the needs of these students?

What are the racial and cultural backgrounds of the students? What are the primary languages of the students? Are you familiar with and accepting of the cultures of the students? Will you be accepted by these students?

Preparing for the Interview

The selection committee has invited you for an interview. You have gathered information about the community, school district, school, and previous principal. What additional issues should be considered?

Keep in mind that interviews serve a dual purpose. They allow the employer to determine the applicant's suitability, and they allow the applicant to assess the employment opportunity. In preparing for the interview, consider what additional information you need to make a good decision and what the interviewers need to know about you.

Selection Process

Begin with an examination of the members of the interview team and the selection process itself. If the individuals selecting the principal are held in high regard and their opinions are valued, the new

principal will be viewed as highly qualified. The opposite opinion may prevail if the selection committee members are held in low esteem by members of the school community.

The stringency of selection requirements, and the size and depth of the candidate pool will also be factors. If the job requirements are stringent, and a large number of candidates from a wide geographical area apply, the candidate selected will probably be viewed as the best possible choice.

The incoming principal should also consider the possibility that the individuals who comprise the selection committee may intend to continue their influence in the administration of the school. Even if ongoing influence is not the intent of the sponsors, the perception that they influence the administrator may be held by members of the school community.

If the selection committee is seeking someone for the position from within the school district, chances are that they want to maintain existing conditions and will anticipate only minor changes within the school. If the committee is looking for an outsider, they may want radical changes.

Consider as well the social impact of being an insider or outsider. If you are hired from within a school district, you will have the advantage of knowing the existing culture, norms, policies, procedures, and personnel. However, you must also deal with previous loyalties, cliques, old rivals, and a host of other insider political issues. Jealous competitors may question the legitimacy of your promotion. Principals may be constrained by existing social patterns, internal politics, and district expectations.

Newcomers to a district may be expected to make more radical changes and may be perceived as having a potentially disruptive influence. Resistance may emerge from long-term personnel who have social relationships, norms, and implied understandings regarding policies and procedures. The outsider who does not understand the informal organization may be isolated from critical sources of information about the school.

Ask questions about the strengths of the district; past successes; long-range plans; tomorrow's challenges, in order to identify val-

ues; and the vision for the future. Look for a shared sense of direction. Do responses match the information provided by residents and district employees?

Values must coalesce. Being asked to behave contrary to personal values causes unhappiness and ineffectiveness. Effective leaders behave consistently with their values. Internal dissonance and ineffective leadership result when one's behavior conflicts with personal values.

Efficient decision-making processes and adequate support of a principal's decisions are essential to good leadership. How do the interviewers describe the decision-making process? Who makes final decisions in the school? What is the scope of the principal's authority? What support can be expected from faculty, parents, and supervisors?

Are the immediate supervisors known for their honesty and integrity? Are they decisive in decision making? Are they known for support of the principal? Look for consistency in what is said during the interview, behaviors you observe, and other information sources.

Who evaluates the principal? The criteria used in the evaluation will determine workload and priorities.

What aspects of this position are more desirable than your current principalship? What do you gain by assuming this job? Are compensation and benefits adequate? Professional growth opportunities and career advancement are also important considerations.

The interviewers want evidence of your potential administrative effectiveness. They must determine whether you are a good match with the school. Before the interview, reflect on what you value and what you will bring to the position. Consider the following questions in preparation for the interview. What do I value? What are my beliefs about education? What experiences have I had that make me an effective leader? What is my leadership style? What are my strongest attributes? What are my past successes? What have I learned from past struggles and failures? What makes me the best choice for this principalship? What are my long-range career plans?

Analyzing the Situation

As a concluding analysis, consider who the power wielders are. Note whether the power is vested in informal or formal leaders. What is the relationship between the formal and informal leaders? Consider how your leadership will coalesce with the school's power structure.

What are the core issues and concerns within the school? Who has determined these issues and concerns? Is there agreement on what the issues are? If disagreement and volatility surround the issues, carefully consider whether or not you want to accept the conflict and risks involved.

The school community is composed of many groups that have both strengths and weaknesses. List these strengths and weaknesses. Will these factors allow you to succeed at the school?

What other obstacles exist at the school? Are there pending legal issues? Are resources adequate for expectations? What is the status of the school's accreditation? Are there concerns about the booster or athletic programs? How effective are the discipline policies and procedures? Although it is impossible to anticipate all issues and situations, the experienced administrator will be aware of the many potential areas of controversy in a school.

Strategizing for Transition

Before accepting an administrative contract, one must be prepared and willing to address the people, issues, and problems that constitute the position. Once the job has been accepted, map out a transition strategy. Identify individuals and groups who will support your leadership. How will you secure loyalty and support? Identifying the issues to avoid and the issues to confront will be essential planning strategies.

Once the position is accepted, all of the issues and problems belong to the principal.

The Lay of the Land: Know Your School

The preinterview assessment of the community and school provide a fine framework for orientation to the new principalship. Once hired, learning more of the history, demographics, and structure of the school will facilitate the transition. Orientation to the school will include learning the context and constraints that exist. Once this has been accomplished, the principal can prioritize goals for the school based on the newly acquired information.

The History of the School

Schools exist in a historical context that affects the relationship between the school and community. There are some fundamental questions to be answered about the school's origins. When was the school founded? Was the community initially in favor of building the school? Is the school a result of consolidation? If the school's origins were marked by unresolved conflict, then tension and controversy may still exist. Proposed changes in the school may renew old hostilities, often to the bewilderment of a new principal. Identify

historical issues that may be waiting to surface. Study the issues carefully and determine which ones you can address.

Part of a school's history is the reputation it has within the community. A school's reputation is often based on a mixture of fact, community conjecture, and/or athletic prowess. One principal lamented her lack of experience and knowledge of athletics. As she moved from one school to another, she was overwhelmed by the needs of the athletic programs. She was not prepared for this responsibility.

Determine whether the school's reputation is positive or negative, accurate or biased. Although difficult to control, rumors and gossip are destructive forces. If this is an issue, design a strategy to increase accurate and positive communication to the community. Get acquainted with individuals who are spreading inaccurate information and speak with them about real issues.

Be attentive to individuals who visit soon after your appointment. They will relate "tales of woe", about past injustices, unresolved problems, or changes sought for the school. Listen carefully, assure your concern, agree to examine issues, but make no promises. There is often a historical basis to the issues presented and further information to consider. After each visit, record names and a summary of the discussion. Gather all the facts before taking action.

One principal said that there was no time to "get acquainted." Instead,

> The problems were lined up outside my door when I arrived. Many had to be addressed immediately . . . hostile parents with a history of dilemmas to impart and most significant—pending personnel issues—terminations and certification problems. I was in a quagmire before my name was on the door . . . no time to "get acquainted" or settle in.

Building on the pride that exists in the school is important. To do this, you have to identify the past successes that the school has enjoyed. Good sources of history and accomplishments are news-

papers, yearbooks, and school reports. Use every opportunity to talk about the school's accomplishments and success stories. As a new principal, you have the opportunity to forge new and strong working relationships with the media.

The Demographics of the School and Community

A variety of facts and statistical information about the school and community exists. The age and origins of the community, as well as historical factors, may affect the current operation of the school. The basis of the community's economy will have an impact on the school. What are the economic strengths of the area? Have there been recent economic crises? What percentage of people are unemployed or receive welfare? Who are the ethnic majority and minorities of the community? What is the ratio of people with school-aged children to those without children in school?

Exploring the neighborhood includes a driving or walking tour of the business and residential areas near the school. Notice the housing patterns and neighborhoods within the attendance area where students live. Note industrial sites, shopping areas, libraries, recreation centers, and churches. Look for signs of construction and change in the community. Make note of areas where students are likely to gather. Observe traffic patterns and be alert to potentially unsafe conditions. Do students walk to school or do they rely on buses or car pools? What role does the school play in transportation?

Visit with neighborhood residents and business owners. They can relate their views about the community and changes in demographic patterns. Listen for comments that reveal the work ethic and values of the community. What are critical issues? Plan to maintain frequent communication with local residents.

Who are the community leaders? What role do they play in the school? Which individuals are involved in school affairs? Become acquainted with community leaders and participate in local organizations. There are many opportunities to describe the school's success.

Organizational Structure

The school usually exists within a school system. Understanding the system and the role of the principal and the school within the system is essential.

The leadership structure, members of the system, and their roles are part of this understanding. The process for communication and decision making are significant procedural details. Written documents, such as district policies, curriculum guides, handbooks, and master calendars provide detailed information. Goals and objectives for the district or strategic plans provide evidence of the direction for the school. Attendance at district meetings will provide extensive information about the thrust and priorities of the district. Meetings will provide evidence of the formal and informal dimensions of the system as well. Listening will be a key skill in understanding the school.

Always keep in mind that this is a new place and these are new people. What worked at your previous school may never work at the new school. Furthermore, most people do not want to hear about the "other" school. Weindling and Earley (1987) reported the adverse reactions that were generated by new administrators' constant reference to their "old" school and the implied criticism of the "new" school and its staff. Remember, "Toto, we're not in Kansas anymore!"

Sources of Information

Before any promises, decisions, or changes are made, study the written information and procedures used in the school. If possible, complete this orientation before officially assuming the principalship. Once in the principal's office, members of the school community will assume that the principal is fully informed. Questions, suggestions, complaints, and requests are companions to the keys to the building.

Having had the experience of other principalships, it is possible to be a good consumer of the written materials that accompany the principalship. The following are important sources of information about the school: the mission statement, curriculum guides, policy

manuals, student and faculty handbooks, personnel files, teacher contracts, job descriptions, standardized text scores, testing program information, long-range plans, budgets, financial records, master calendar, class lists and schedules, teacher assignments, old newsletters, faculty bulletins, and minutes and by-laws of parent organizations. Study each carefully because they will provide a knowledge base for decision making. Photographs of faculty, staff, students, and school events are helpful. Yearbooks also provide an interesting perspective on the school.

Procedures and Practices

Procedures and practices may represent long-held traditions and customs at the school. Be sure to respect these special events. Practices and procedures transplanted from your previous school may be unwelcome. Learn the procedures for the opening of school. During the summer, questions will be asked about school opening, class placements, and a variety of issues. Familiarize yourself with procedures so that you can respond to these questions.

Similarly, procedures for enrollment and withdrawal should be examined. Questions may arise about withdrawing and transferring records. Responding to these questions will require knowledge of these procedures.

A stack of mail and telephone messages will greet you. Procedures that streamline the handling of written correspondence and telephone messages may exist. Take advantage of systems that facilitate your work, and consider aspects of the new job that may make your work easier. The newness of the job provides an opportunity for change in practice; take advantage of this window of opportunity for job redesign.

Learning to operate the telephones, computers, electronic mail, and other technology may be important in your new job. Many individuals will seek the ear of the new principal and will approach in person, by telephone, or by letter. As you know from experience, caution and consideration must be exercised in your responses. Having adequate information for a decision is imperative.

You also may be besieged by teachers about a range of issues, such as discipline, departments, interpersonal issues, class assign-

ments, room location, resources, extra duties, or class lists. Examine all aspects of the issues before making any changes or recommendations. Consider your predecessor's reasons for decisions.

Management Details

If your new principalship begins with the start of the academic year, you must attend to all the management details, which include providing materials. Be sure that all books and supplies have been ordered for the school year. Review how needs are identified, the source of funding, how orders are processed, and how bills are paid.

Have all personnel been contracted for the upcoming year? If teachers or staff are needed, what recruiting and hiring procedures are used? Be aware of the personalities and assignments of existing personnel, job descriptions, and curriculum needs. Consider the context of the whole school when selecting personnel. Become familiar with teacher contracts, salary for certified and noncertified personnel, and benefit packages.

Another management detail is legal issues. If a contract termination or lawsuit is in progress, become thoroughly familiar with the situation. Contact the school district's attorney and proceed accordingly.

If building repairs or construction projects are under way, obtain a copy of the construction proposal and contract. Meet with the architect or contractor to discuss the plans, financing, and time frame. Consider the impact of the completed area on current space usage and traffic flow. If the construction is not completed when school opens, what accommodations need to be made?

Other management details include routines. Before school opens, become acquainted with procedures for handling the following: fundraisers, collecting money at school, disciplinary referrals, field trips, emergency drills, injuries and illness, attendance and tardiness, athletic events, school assemblies, and grading. The condition of the physical plant is also a management concern. Note problem areas and safety concerns. If a long-range building plan for maintenance exists, review it in relation to the information you have gathered. If you supervise the custodial staff, secure and read the custodial job descriptions and past performance evaluations. Plan to meet with the custodial staff to tour the building.

The Faculty

First impressions are enduring. The faculty will judge your leadership ability based on the organization and quality of the opening event. Review past practices, and consider your efforts in your previous principalship. Build on success and consider what is best for the audience. Review past staff development programs. How innovative and extensive were they? Are any programs ongoing? Is a long-range staff development plan in place? What strengths, weaknesses, and future needs exist?

Provide structured orientation and initiation procedures for new teachers. Plan ongoing induction activities to ease their transition. Assign mentors to facilitate induction.

The faculty are important to the school's success. Duke, Isaacson, Sagor, and Schmuck (1984) found that faculties were the most important source of influence, satisfaction, and dissatisfaction that new principals experienced during their first year. Getting to know them and working with them is a primary responsibility of the new principal. Examining the personnel files of the faculty will be helpful. As you examine these materials, note the ages, gender, ethnicity, experience, education, and professional growth of the individuals and the group as a whole. What are the important similarities and differences? How will this faculty differ from your previous faculty?

What documentation exists of prior teacher appraisals? How often were teachers observed? What are the provisions of the negotiated agreement regarding observations? Is there a pattern of strengths and weaknesses? Note any critical personnel issues that may need immediate attention, such as incompetence, pending termination, and certification problems.

The Administrative Team

The administrative team is critical to your success. Who are the members of the team and what tasks do they perform? What are their strengths and weaknesses, and what do they like about their jobs? Plan to spend considerable time becoming acquainted with these individuals and their contributions to the school. Their support and contributions are vital. Peers provide support that enables new managers to bridge the organizational transition between themselves and their predecessor (Brady & Helmich, 1985).

The secretarial and office personnel will play an important part in your leadership transition. The quip "the secretary really runs the school" is more often true than not. Significant informal leadership emanates from the office staff. Developing positive relationships with these individuals is essential. Determining strengths, weaknesses, tasks, and preferences are important learning for the new principal.

Assess the office operation based on information you have received and your initial observations. Does the office appear to operate efficiently and effectively? Does the staff work cooperatively? What are the perceptions of students, faculty, and parents?

Before suggesting any change in office procedures, be sure you have an accurate assessment of current practices. Before initiating changes, involve the staff in the discussion. The wise principal makes changes only after establishing rapport.

If the school provides food service programs, meet the individuals responsible for this operation. If financial responsibility for food service rests with the principal, examine the financial records and audits from previous years. What issues concern the program supervisors? Have there been parental, student, or staff comments concerning the program?

Activities and Athletics

Activities and athletics are often important concerns in a school. What emphasis is placed on athletics and activities in the school? Athletic and activity directors and coaches can be influential and powerful leaders. Because these activities may typify the history, traditions, and culture of the school, sensitivity to the new school and its norms is essential. Budgets, game schedules, and athletic handbooks are useful data sources. Safety and insurance issues are important.

The Parents

Parental involvement is an important source of support in a school. To what extent do parents volunteer at the school? What is the rate of participation in parent-teacher conferences? How much parental involvement is there in school activities?

Assess the involvement and influence of parent organizations in the school. Read agendas and minutes of past meetings. Visit with committee members to learn about past projects and successes, and meet the leaders.

Parents want communication with their school. What methods have been used to communicate with parents? Are parents satisfied? Read the school newsletters.

The Students

The school ultimately exists for the students. All structures, procedures, and activities of faculty, staff, and parent groups must be designed to enhance learning and serve the needs of the students. What are the specific needs of the students?

Examine the demographics of the student body. Consider the economic conditions and the families of the study body. How does this school compare with other schools in relation to poverty or affluence? What percentage of the students live with both parents? What ethnicities and language groups are represented in the school?

Examine student records and standardized test scores. Are there curriculum areas that reflect excellence or a need for improvement? Make note of student achievements and awards. What are the academic, artistic, and athletic strengths of the students? What percentage of students qualify for enrichment and advanced courses? What percentage of students qualify for remedial help and special education services? What special programs are provided at the school?

This Is the Place: People, Values, and Demands

Meeting the Players

Schools serve both internal and external publics. The internal public is composed of students and staff, whereas parents and community members make up the external public. Both groups will be anxious to meet you. Remember that meeting the people with whom you will work should be your priority. Discover their strengths, philosophies, expectations, and plans for the future. This information will allow you to understand the culture of the school.

Each school has a unique culture, shaped by the beliefs, values, and interactions of its members. In time, the culture grows and becomes resistant to change. Longtime members refer to it as "the way we do things here." Learning the new culture is essential for the new principal. Memories of your last school and its culture must be put aside.

A newcomer can observe the culture by watching, listening, and meeting with staff, parents, and students. Keep a journal of your observations, because fragments of information that initially appear meaningless may later weave a tapestry of significant knowl-

edge. Analyze this information and formulate conclusions about the norms that exist within the school culture.

Expect your socialization to the new principalship to be lonely, individual, informal, and random. Initially, you may encounter scrutiny, skepticism, and opposition. Until individuals are comfortable with your values, respect your level of expertise, and are able to predict how you will respond to common situations, the trust level will be limited. Although your position grants you formal authority, informal authority and trust are earned.

Hart (1993) reports that the first 3 to 6 months are a critical time during which a new principal's expectations can be communicated by action and by the use of symbolic communication that communicates beliefs about what is important. Successful new principals work to develop three qualities in their working relationships that are particularly salient to success: mutual expectations, trust, and influence.

Remember, too, that some parents and staff members may attempt to promote their personal interests by capitalizing on your neophyte state. Obtain all the facts before making any promises or changes.

Move Slowly, Tread Lightly

Although some people may welcome a change of leadership, others may view your appointment as a less-than-joyful event. If your predecessor had a close working relationship with the staff and was well-liked by the students, both may be grieving their loss. Old loyalties may result in resentment toward you. Individuals may attempt to sabotage your position by withholding critical information. Group members may withhold information from the new leader (Hart, 1993). Fear and apprehension about change may prevail. Acknowledge their loss and allow ample time for adjustment to change. Be careful not to appear critical of your predecessor.

Individuals may resent you because of your success as principal of a different school. Stories about and comparisons made to previous schools will not be welcomed. Each school has a unique population and set of issues. Strategies that worked in the past may not be useful now. Instead of inspiring confidence, tales of past success may inspire resentment.

Who you are will affect how you are received. What reputation precedes you? What image do you present? How different are you from previous administrators? The greater the differences, the greater the apprehension and suspicion that will greet you (Hart, 1993). For example, if you are different from your predecessors in ethnicity, gender, religious orientation, educational background, or economic status, you will be scrutinized and suspected. To combat this apprehension, minimize differences by emphasizing educational values that you share with the members of the school and community. Search for common ground.

Once you receive your appointment, you will be anxious to get involved in the school and meet the people. Visiting the new school before you take charge provides the chance to observe, question, diagnose, and prepare tentative interpretations to be confirmed (or not confirmed) during subsequent contacts (Hart, 1993). However, if a school year is still under way, exercise restraint. Do not meddle in school affairs. Instead, be sensitive to the needs of the current principal and staff. They need time to complete activities and bring closure to the year.

Interaction between outgoing and new principals provides data to the newcomer (Hart, 1993). Ask the principal to select an appropriate time to meet with you. Have a list of questions ready when you meet. Take notes or tape-record the meeting so that you can study the information later. Remember, too, that the incumbent principal may be leaving under duress and may not welcome your presence.

Make changes gradually as you win the trust of the staff. If you identify a situation that needs to be changed immediately, discuss it with the personnel involved. Find out why the current practice exists and involve others in the planned change. Staff will be less resistant to change if they have participated in the decision-making process.

Remember that principals make "little movement beyond the level of development that had begun to emerge after the first year"; the first year is "the handwriting on the wall projecting [a] principal's eventual effectiveness" (Hart, 1993, p. 220).

Stop, Look, and Listen

Identify the job satisfactions of the administrative team. Listen for comments that provide information about attitudes, beliefs, and expectations. Who are the staunch supporters of the status quo? Who are the friendly critics? Who promotes radical change? Who has the respect of the group? Which individuals are the spokespersons? Who are the leaders?

Determine relationships with your predecessor. Be aware of the possible existence of personal agendas and old loyalties. Did anyone seek the principal's position that you now hold?

Find out how the leadership process operated in the past. How much authority was delegated? What style of leadership was used? How was communication accomplished?

Indicate a willingness to meet and communicate frequently with administrative team members. Their loyalty and support will be key factors in your acceptance.

Study faculty photos to learn teachers' names and what they teach. If possible, arrange to meet with each teacher before school opens. Initial meetings should be casual, get-acquainted sessions. Let the teachers know that you are open to meeting and communicating with them. Find out what values, beliefs, and expectations they share. Make note of the leaders and respected spokespeople of the group. Listen to their observations and let them know your wish to work cooperatively. You need their endorsement and support.

All teachers expect changes in some form to be stimulated by principals—those undergoing succession expect more change and more important changes. Teachers in succession schools "anticipated new leadership; they expected the principal to significantly affect the mood, tone, and interactions in the school" (Hart, 1993, p. 207).

A clean, safe environment requires the goodwill and support of the custodial staff. Ask for a tour of the building. Identify any safety hazards and maintenance needs, and ask about problem areas, concerns, and future plans. Careful listening will inform you of attitudes toward work, the students, and the staff. Does a good working relationship exist with students and staff? How has the

custodians' work been evaluated in the past? Plan to meet on a regular basis to discuss building needs.

The student level of anxiety and concern with a leadership change will vary according to age and level of involvement with the principal. The new principal should meet the students. If appropriate, tell the students why their previous principal left and where the individual is currently employed. Reassure them that you are happy to be their new principal and want to get acquainted with them. Spend time visiting with students in areas where they gather and be visible throughout the building. Your presence will let them know that you care about them.

Older students may have specific issues they want addressed. You may have requests for meetings with student leaders. Students are an important source of vital information. Listen carefully and give their concerns and requests serious consideration. Assure them that you will investigate and meet with them again.

Gather ample information and gain the confidence of parents before proposing any changes in parental involvement. Make significant changes only after parents know and trust you.

You may be surprised at the style or manner that parents use in approaching you. They may be more casual, formal, or assertive than you expect. The norms of each school provide a format for parental interaction with school staff and participation in school events. These are some of the unwritten rules known by everyone except you.

Learning the Norms

From your conversations, you should have a sense of the values, beliefs, goals, and norms of the school. The culture of the school results from the interactions of its members with each other and with the school's environment. The members of the school have a shared history, shared beliefs, and a shared process of interacting. If you are going to be accepted as a member of this group, you must pay careful attention to commonly shared meanings as well as the interactions of the members. One principal said, "I was surrounded by hundreds of people yet felt totally isolated and incred-

ibly lonely. I was an outsider in the midst of people who had spent years working together."

First, successors should spend time and effort learning about the unique plans, beliefs, and expectations of each teacher and other important people associated with the new school. They should find out which people are respected spokespersons for the group and which can be counted on as friendly critics of the status quo to provide them with an "outlier's" look at events. Friendly (or neutral) critics can be immensely valuable because they can provide a successor with important details that are different from previous experiences or expectations (Hart, 1993, p. 276).

There are many clues about the shared beliefs of the school members. When you enter the school, what climate do you sense? Is the pace busy or relaxed, casual or formal, friendly or cold? How do members greet each other—formally or informally, friendly or reserved? What is the attitude toward students? What type of staff morale do you sense? Do people enjoy working in this school? What is the focus of the school? What are topics of concern? What work norms do you observe? Do teachers arrive early and work late? Are academic expectations high?

In your new principalship, you seek social validation. Undoubtedly, social validation is the aspect of your previous principalship that made the work enjoyable. It is one aspect of your new role that cannot be assumed; it must be earned. Social validation occurs when you are accepted as an integral part of an organization. It occurs when you demonstrate that you share the beliefs and expertise valued by the members of the school.

How do you obtain it? You earn it by identifying the dominant values, beliefs, and expectations shared by the school and demonstrating that you share these values and possess the experience and expertise to lead the school toward its goals.

Initially, you must seek opportunities to demonstrate your abilities. This includes selecting actions that will benefit a large population and picking a task that can be successfully accomplished. In this way, you highlight your expertise and have the opportunity to publicize the accomplishment.

Unless a situation is critical, save high-risk problems and conflict issues until you have been accepted by the school community. Once

you are a trusted member, controversial changes can be made more easily.

You will be required to adjust your behavior to meet the audience with whom you are working. This will necessitate a considerable amount of caution. Your previous experience may cause you to be overconfident about your behavior. Monitor your behavior for appropriateness with the group. Observe the responses your behavior generates and adjust your behavior accordingly.

Patience is essential. Trust and acceptance are earned slowly, one day at a time and one person at a time. Social validation can take months, even years, to achieve.

Recognizing the Supports and Demands

People expect the new principal to learn the culture and become an integral member of the organization. They expect changes to be made as the new principal assumes leadership, which poses a dilemma. How much should you conform? Too much conformity to the existing culture may negate your impact as a leader. Yet lack of social acceptance may impede any improvements or innovations you attempt. The wise principal consistently monitors responses of the group to determine which changes will be successful now and which ones should be delayed until trust has been established. One principal said, "Living within already established parameters is difficult. I constantly ask others how situations were handled in the past so I don't make mistakes."

When influential leaders leave, for whatever reason, it is not uncommon for all change efforts in progress to slip into a state of suspended animation. Those involved in the change wait, their nerves on a roller coaster of fear and hope. Frequently, good efforts at change are dismantled and a new plan constructed, only to be taken apart when the next leadership transition occurs (Wasley, 1992, p. 64).

What do members of the school want? Analyze the notes from your meetings. What needs were expressed? What changes are sought? Which demands are group specific? Do any of the demands involve the entire school? Are any of the needs critical? Do

problems exist that need immediate attention? Which ones are easy to handle now? Which ones are complicated and controversial? Which are totally unrealistic?

Make a list of the individual, small group, and school demands. Prioritize the demands according to immediacy. Consider their importance and relationship to other information you have gathered. Who are the leaders and spokespeople in the school? Who seems to be eager for new leadership and change?

The nonsupporters in the school may openly disagree with you or quietly undermine your authority. They may be constructive in their dissent or deliberately destructive. Nevertheless, they are part of the school. If you focus only on the supporters, you may create warring factions in the school. Instead, listen carefully to the nonsupporters. They possess valuable information. Consider all opinions expressed when making a decision. As long as dissent is constructive, welcome it.

One principal reported,

> I did not consider the effect of the frequent leadership changes that had been experienced by the faculty. I expected to be welcomed with enthusiasm. Instead, they were suspicious and reluctant to interact. They had formed tightly cohesive groups among themselves and had adopted a "holding pattern mentality" for survival. Changes I proposed were viewed with cynicism . . . "All of the principals bring in changes . . . then they go away leaving us to keep the school operating." I had a sense that they were humoring me, anticipating that it was only a matter of time when I, too, would depart. A few faculty leaders withheld information or sabotaged my communications with others.
>
> Meeting with and listening to the concerns of each teacher over the summer would have helped to initiate some rapport. Understanding their bitterness and disappointment with past leaders would have tempered my hasty approach to making changes.

Who Am I? Developing Your Own Leadership Style

Considering Past Leadership Success

The transition to a new principalship is a professional challenge. The transition requires confidence and risk-taking behavior. Part of your confidence has to be based on your past leadership successes.

Successful leaders have a clear picture of who they are. They know their personal strengths and weaknesses. They lead by showcasing their strengths while working to improve weak areas.

As you prepare to make a transition, it is helpful to reflect on your leadership strengths and the strengths that you bring to the principalship. Following are questions to consider as part of a self-assessment.

Values and Priorities

- Why did you become an educator?
- What do you value as an educator?
- How do you prioritize your time?
- How do your priorities match your values?

Human Relations

- Is your primary focus on ideas or people?
- What is your level of trust in people?
- How do you communicate with staff, students, and parents?
- What is your interpersonal style?
- What impact do you have on others?
- What are your strengths and weaknesses in dealing with people?

Task Orientation

- How do you make decisions?
- How often and under what conditions do you delegate?
- How do you initiate and implement change?
- Are you conservative or a risk taker?
- How do you deal with adversity and conflict?

Personal Issues

- How do you balance work, family, and personal time?
- How do you take care of your mental and physical health?
- What activities do you pursue outside your career?
- What responses would your family and friends give to these questions?

Recall the successes you have enjoyed as a principal. Analyzing past successes will allow you to identify your strengths. Consider the roles you had in your last principalship. Which of these roles was or were most satisfying and why? As instructional leader, you developed goals for the school, established performance expectations, developed curriculum, and provided professional growth opportunities for teachers. You worked with students and teachers to create a learning environment, and you engaged in school-community collaborations. Perhaps you initiated innovative programs, policies, or procedures. You may have designed a new instructional model or opened a new school. What other tasks did you undertake? In which roles do you perform best? What do you consider to be your greatest accomplishments?

What skills did you display in achieving your successes? Do you excel at writing or public speaking? Are you skilled at conceptualizing and communicating a vision? Perhaps you are skilled at motivating others to excel. Are you creative, innovative, willing to take risks? Do you pride yourself on organizational skills and attendance to detail? Are you skillful in developing trust in others? Are you a decisive decision maker? Do you excel at using participatory decision-making skills? Are long-range planning skills your forte? What are your strengths?

Successful leaders are also aware of their weaknesses. Identify areas that are weaknesses. What areas would you like to improve?

Part of who we are is unknown to ourselves but visible to others (Johari Window). Self-perceptions may be limited. Principals who perceive themselves as highly skilled in an area are shocked when teachers or superiors report opposite perceptions on principal evaluations. One principal who prided himself on open communication and relationships with people was horrified when the year-end evaluations completed by teachers reported that he was weak in both areas. This is an important consideration. Your unknown side may mean the difference between success and failure. You need a systematic self-evaluation process that includes data from a variety of sources.

Data sources include the following. As a first step, review your past performance evaluations. What do teachers say that you do well? In what areas did they suggest a need for improvement? What did your superiors identify as strengths and weaknesses on past evaluations? What evaluative feedback have you obtained from peers or parents? Consider being videotaped while performing administrative functions, such as conferencing with teachers, working through a conflict, conducting a meeting, or giving a presentation. Participation in an administrative assessment center can provide further information about your skill as a principal.

The data collected from a variety of sources allow you to have a clear picture of your strengths and weaknesses and can form the basis for a professional development plan.

Recognizing Current Leadership Needs

As you consider your leadership strengths, how do they match the new principalship? What aspects of your expertise are best suited for the new setting? What adjustments will be necessary to ensure your success?

Effective leaders match their skills with the needs of the school. Principals skillful at the presentation of self will be apt and astute self-monitors; they will observe and attend to the social demands of the new school. They will be able to behave in different ways in different situations, depending on the behavior expected by the group (Goffman, 1959). What are the needs of this school? What kind of leadership is needed in the new school?

Consider the expectations of the new school district and the expectations of those who hired you. You were selected for specific reasons. Were you hired to make specific changes or to maintain the status quo? Were you selected for the particular skills that you possess? Determine what you are expected to accomplish. Which skills will serve you best in meeting these expectations?

One principal described her strategy:

> Stating clearly one's educational values sets a positive tone to begin a school year. Candidates are usually chosen for positions because their philosophy matches that of the local district or school board. Clearly stating values ("schools are for kids, every decision made must be made on the basis of what is best for kids") lets faculties know that the administrator is a team player and what others need to do to play on the team.

What are the leadership needs in your school? The expectations of the teachers, parents, and students are important considerations. The needs and expectations of teachers, parents, and students may be different. What does each group want you to accomplish? What kind of a leader do they want? Review the notes from your earlier meetings. Consider past leadership in the school as well as the level of involvement with planning and decision making for the school. What leadership approach will best serve the needs of the school?

Consider the changes that you want to make. Will superiors, teachers, parents, and students agree with your assessment? Do certain situations require immediate action? Are difficult personnel issues pending? What issues are simmering? What old issues will emerge? What leadership approach will successfully resolve old issues and bring about needed change? Which leadership behavior and course of action have the highest probability of success? What changes will most likely be successful?

Identifying My Leadership Approach

Leadership studies report that effective principals have a clear vision of their goals and a commitment to achieving them. They effectively communicate their vision, thus creating shared goals for the school.

Do not assume that what worked in past principalships will work in the new principalship. This is not a "repeat performance," but an entirely different setting. What worked at one school may be a disaster in another.

For instance, one principal reported,

> In the early months, I mistakenly used the same style of communications that I had previously used. It was not effective. By the time I realized this, miscommunication and distrust had resulted and I lost time establishing the trust of the faculty. I should have considered the size of the school faculty, the culture of the group, and the style of communication they previously used.

Visionary Leadership

The conceptualization of visionary leadership derives from the effective schools literature that contributes to our understanding of effective principals. Researchers cite principal leadership as a domi-

nant influence in schools recognized for outstanding progress toward excellence. Effective principals are distinguished from other principals in that they have been shown to be instrumental in the production of improved test scores, increased attendance, orderly learning environments, clear academic expectations, and other achievement-oriented goals (Cuban, 1984; Grady, Wayson, & Zirkel, 1988; Leithwood & Montgomery, 1982; Mangieri & Arnn, 1985; Purkey & Smith, 1983; Rutter, Maughan, Mortimore, & Ouston, 1979).

Five qualities represent the conceptualization of visionary leadership. First, visionary leaders are pervasively motivated by deep personal beliefs and values. Second, visionary leaders have an adamant and energetic commitment to the realization of the goals that they think are best for their organization. Third, visionary leaders know that a clear sense of direction or purpose, shared among all the members and bringing organizational ideology to prominence, is an essential condition for change and goal attainment. Fourth, visionary leaders have an intense predilection for innovation and seek to change their organization. Fifth, visionary leaders promote an image of the future of their organization that represents change for the better. These five qualities represent a conceptualization of visionary leadership (Grady & LeSourd, 1989-1990).

In general, public school principals have a high regard for visionary leadership. Their positive attitude implies that principals believe in the importance of innovation, a sense of direction of their school, and a vision for the future (Grady & LeSourd, 1989-1990).

Those who work in effective schools share a common vision. What is your vision for the school you are about to lead? How will you communicate your beliefs, priorities, goals, and vision for the school? What leadership approach will make the vision a reality?

As you consider your vision, consider this principal's experience.

> Later, I discovered that my immediate superiors and members of the school community did not share a common vision for the school. I was caught in the middle of conflict. History and old agendas were very much a part of the conflict.

The communication style that worked in your last school may be ineffective in your new school. Consider the size, educational levels, and composition of the school population. A 9-year veteran principal changing from a small to a large school reported,

> I was accustomed to using mainly informal communication with the faculty and parents. I spoke personally with each teacher and many parents daily. I was unaware of the need for a large-scale communication system in my new school. Needless frustrations and miscommunications were the result.

Your previous faculty knew what your vision and goals were. They knew what you admired and regarded as success. The new faculty members do not know this. They need to understand your vision, goals, and expectations. How will you create a setting in which teachers are supported in their efforts and encouraged to try new ideas? How will you provide the verbal and written recognition and acknowledgment that individuals in your new school deserve?

One principal noted,

> I assumed that the new faculty knew that I valued and appreciated them. My old faculty knew this and I didn't spend a lot of time giving them affirmation. The difference was, I had known the previous faculty for many years. They knew me. The new faculty had just met me. They were fearful and anxious. I should have provided more affirmation and reassurance about their performance-levels. I lost valuable time establishing rapport with them.

Effective leaders believe in themselves. They are confident and view themselves as respected, capable, and worthy of the positions they hold. They pride themselves on their personal values of integrity, honesty, and loyalty.

All eyes will be watching you! The immediacy and skill with which you take charge is critical. You need to be both capable and decisive. How can you showcase your strengths in this position? How can you use the strengths of others to complement your lead-

ership and compensate for weak areas? How can you adapt your style to meet the needs of the new school? You must know both yourself and the school. You must be yourself and recognize and capitalize on your uniqueness as a leader.

Setting the Course: First Steps, Next Steps

Identifying Needs and Priorities

Does the school need to change or do you need to change? It may be appealing to change procedures and programs to resemble your previous school. Although such changes will make your role more familiar and comfortable, they may not be appropriate for the new school. Each school has a unique population and corresponding needs. What worked effectively in the last school may be disastrous in the new school. Consider each change in light of the school context. Programs and procedures that are unfamiliar to you may be highly effective in the new school.

One principal said that when he came to this new principalship, he had the same dilemma he had had in his previous principalship:

> I didn't know the people, their personalities, or their background experience. I didn't know who to go to for what. I didn't know who had the gold. I'd already learned that January and February are "get the principal months." People are edgy and irritable. It is a bad time to try to spring something new on the staff.

> I remembered my mistakes from the last place and tried to avoid those same mistakes here.

Another reported,

> I knew from my last school that I couldn't go in and immediately start making changes. Experience also told me if I waited until my second year here to try the changes I've told you about, I'd be caught up in established traditions.

Some needs will be obvious and require immediate attention. Needs such as legal issues, disgruntled personnel, teacher vacancies, safety problems, and angry parents will demand immediate attention and quick solutions. Seek simple solutions before you consider elaborate remedies. Complex issues will require extensive study and the cooperation of the school community to reach resolution.

One principal reported that an initial investigation of the school uncovered three main problem areas. First, community members said that students are unruly and classroom behavior disruptive. Teachers expressed displeasure with student behavior. Second, a large number of students arrive at school early and linger on the grounds long after dismissal. Third, student test scores in reading and math are low. Improvements are needed in these areas, but input from the faculty, parents, and community is needed.

Before proceeding, the principal examined the functioning of the school personnel. The teachers were not accustomed to making decisions and planning as a group. The first step was to work on team building. Each team member had to (a) be able to articulate the goals of the school, (b) participate in making decisions that affected them, (c) be personally accountable for actions, (d) be given the opportunity to fully develop and use talents, and (e) be valued and respected. An effective team means better performance results for the school. Once the team was working, then the issues concerning student behavior, early arrival and late departure, and achievement scores could be addressed by the team.

The key to effective school improvement is planning that involves school personnel and key constituents. Planning models

should be followed. Begin by forming a committee of teachers. This committee may include the entire faculty if the school is small. Key stakeholders, such as parents, board members, and community members, should be included. If possible, include someone from the central office to ensure compliance with district plans. For those not included in the committee, plan a method for communicating the work of the committees and providing a means for input. Establish a timeline for the planning.

Gabarro (1987) described three effective behaviors on the part of successors. Successful new managers were effective at (a) assessing the organization and diagnosing its problems, (b) building a management team focused on a set of shared expectations, and (c) bringing about timely changes that addressed organizational problems. These studies failed to support the conventional wisdom that new administrators should wait and see before making changes, revealing instead a three-pronged wave of changes within the first 6 months of a new manager's tenure and a strong and healthy pattern of working relationships with others in the organization (Gabarro, 1987, p. 57).

Investigate the characteristics of the school and community. Assemble information about students, personnel, and school programs. Examine statistics regarding admissions, withdrawals, attendance, enrollment trends, dropouts, achievement levels, disciplinary measures, violence, vandalism, counseling needs, socioeconomic and ethnic trends, and family structure. Review your profile of the faculty, including age, experience, training, and staff development. What is the level of teacher absenteeism, turnover, morale, and job satisfaction? What are the current curriculum issues, new programs, and budgeted resources? What internal signals indicate that change is needed?

Gather information about community factors affecting the school. Review the information that you gathered when investigating the community prior to taking the position. Use the input of committee members to extend your information. Consider family structure; lifestyles; economics; population trends; law enforcement; social services; business possibilities; employment levels; and funding from local, state, and federal government.

What course of action is suggested by the collected data? Does the information suggest the need for an improved school discipline plan? Have changes in family structure and work habits created a need for an extended care program for students before and after school? Do local employers confirm the need for improvement in math and reading?

Decide which areas can be improved. Consider staffing needs, resources required, and long-term impact on the entire school. Prioritize the needs that were revealed.

Planning for Change

Once improvement areas have been identified, engage your committee in identifying improvement strategies.

Consider the impact of proposed improvements. Who and what will be affected by the changes? What support will you have? What resistance will you encounter? Individuals who feel threatened by a change will resist, as will those who perceive that their work will increase because of the change. Resistance to change occurs when individuals fear uncertainty and possible personal loss. A cohesive group of teachers may perceive a threat to the group's norms. Some individuals may resist because they think the change will present too many problems. Others may resist because they do not trust the administrator. Hart (1993) reported that although teachers feared that the new principal might encroach on their instructional autonomy, they also hoped that the successor would be willing to support teachers, be friendly, and be able to develop a sense of unity and involvement in the school (p. 149).

One principal reported,

> In my previous school, I was accustomed to having great autonomy in initiating and implementing new programs, policies, and procedures. If I suggested a change, I could anticipate support from my superiors and the school stakeholders. Changes were made decisively and quickly. When I took the new position, I proceeded as I had in the past, only to be thwarted each step of the way. What I did not anticipate were

the (seemingly endless) committees and boards who were accustomed to having input into every change. Making changes became a monumental hurdle. Time-consuming meetings and debates made the progress incredibly slow. As a result, improvements to the school came slowly and in some cases did not occur.

I should have examined the existing procedures for decision making before accepting the position. In this case, the leadership of the principal was diluted and diminished by entrenched practices.

To avoid this situation, provide information about the present situation and the reasons for change. Discuss the changes with those who are opposed. Seek their viewpoints and suggestions regarding the change. Involve as many people as possible in the planning and implementation of the change. People who participate in the change process are less likely to resist it. Reassure concerned faculty members that training opportunities to learn new skills will be provided. Provide evidence that appropriate resources to implement the changes are available. Teachers expect changes from new principals, and the manner in which these changes occur and the timing and pacing of change are important factors (Hart, 1993, pp. 236-237). Diminish resistance by providing incentives for cooperation, such as recognition, rewards, pay raises, and bonuses. Avoid techniques that involve manipulation and coercion.

Make copies of the completed plan and distribute it to all who are involved. Monitor progress as the plan is implemented. Continue to meet regularly with the planning committee until the change has been completed. Communicate progress to key constituents.

Because perfect plans are rare, you should expect some difficulties. When corrections and modifications are needed, meet with the planning committee and make changes accordingly. Notify key people about the changes and the rationale for them.

Unchecked discouragement can thwart your plan. When problems and resistance become overwhelming, people give up. Provide encouragement and celebrate small successes. Make sure faculty and other key figures know that their efforts are noticed and appreciated.

The success of the first change you make is critical. If the planning and implementation are successful, faculty and parent leaders will gain trust and confidence in your leadership ability. They will also understand the need for effective planning and have confidence in their ability to make improvements.

Earley, Baker, and Weindling (1990, pp. 24-25) provide the following advice:

1. Seek to build confidence in what you do.
2. "Don't sit around too long."
3. Decide on your objectives and put a plan together.
4. "Timing is important. You have got to be an opportunist . . . seize the opportunity when you see an interest."
5. Support people who will make changes.
6. Be flexible but clear about principles on which you stand.
7. Make sure that people who will be affected by changes have a say.
8. Spend a lot of time listening and establishing a sense of direction and long-term vision.

Leadership is like walking a tightrope (Bennis & Nanus, 1985). Instituting no changes or improvements will cause people to question your leadership skills. Instituting changes too quickly or too drastically will precipitate a crisis. Remember, school administration is walking a tightrope, and administrators always work without a net.

Annotated Bibliography and References

Annotated Bibliography

Brady, G. F., & Helmich, D. L. (1985). *Executive succession: Toward excellence in corporate leadership.* Englewood Cliffs, NJ: Prentice-Hall.

This book presents both research and examples describing leadership succession among top corporate executives.

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Earley, P., Baker, L., & Weindling, D. (1990). *Keeping the raft afloat: Secondary headship five years on.* London: National Foundation for Educational Research in England and Wales.

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This study attempts to understand how employees deal with the uncertainty and challenges that new job assignments entail. The study investigates the differences between employees coping with a first job in an organization and employees coping with a job change within an organization.

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The emphasis of this book is on how to manage the succession process in a way that yields optimal outcomes for both the individuals involved and the organizations in which they work.

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Goodman defines a turnaround as producing a noticeable and durable improvement in performance, to turn around the trend of results from down to up, from not good enough to clearly better, from underachieving to acceptable, from losing to winning.

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This report is part of a series of publications by the authors concerning leadership and principals. The series is based on interviews with principals as well as findings of studies using a visionary leadership inventory.

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This article examines the issues of linking the selection of top-level executives with the development of these people. It first describes three stages in an organization's development of a succession system that promotes the attainment of a firm's

objectives: (a) one-position staffing, (b) replacement planning, and (c) succession planning. The article concludes with recommendations for enhancing personal learning for executives and for better integrating this learning with the strategic succession planning of the organization.

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